

What to Look for in Your Record – A Simple Guide from OPM-4

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Background

Your Record

Your record is a collection of documents used by the Coast Guard for making significant personnel decisions – such as promotion boards, assignments, screening panels, and more. It is ultimately your responsibility to maintain your record, and this document is meant as a guide for helping to take care of your record.

What Is Your Record?

The two primary sources of information for your record are your:

- **Employee Summary Sheet (ESS)**
- **Electronically Imaged – Personnel Data Record (EI-PDR).**

Boards and panels are confined to use only the information posed in your record, aka “matters of record”, and not word of mouth. ***For all intents and purposes: if it's not in your record, it didn't happen.***

Employee Summary Sheet (ESS)

How do I view my ESS?

If logged into a CG workstation, you can access your ESS at any time. This provides a basic snapshot of your career history and accomplishments, and can be found through CGBI.

Link: http://cgbi.osc.uscg.mil/2.0/contentpanes/personal_files/summary_sheet.cfm

-----OR-----

Open CGBI from your desktop icon. Click on the "Personal" tab at the top, then click on the "Skills" tab from there, and then click on "Summary Sheet".

How do I update my ESS?

Your ESS pulls from Direct Access. Please see your YNs in your nearest Personnel & Administration (P&A) shop or Servicing Personnel Office (SPO) to update.

Note: Your YNs are no longer able to directly enter your education information by themselves. To update the "Education" portion of your ESS, as well as to get a transcript into your EI-PDR, please refer to the Coast Guard Institute and ALCOAST 043/16.

Employee Summary Sheet (ESS) Continued

There are 3 different “Views” for your ESS. In the top right corner, you can select:

---- **“My View”** – This is the default view. This is what you see when you open your ESS, and is what the detailers use.

---- **“Board View”** – This is how Promotion Boards view your ESS.

Note: Some Personal Info, Rank History, Education Data, Test Scores, Boards & Memberships are “Masked” and are not visible when in Board View

---- **“Panel View”** – This is how Command Screening and Advanced Education Panels view your ESS.

Note: Some Personal Info and Rank History are “Masked” and are not visible when in Board View

Employee Summary Sheet



Name:	John Coastie	Date of Birth:	06-27-1987
Email Address:	John.Coastie@uscg.mil	DIEMS Date:	06-27-2006
Employee ID:	1234567	Active Duty Base Date:	05-20-2009
Position Number:	123456	Pay Base Date:	05-20-2009
Grade:	O3	Grade Entry Date:	05-20-2013
Class:	Military	Employee Rotation Date:	07-01-2016
Duty Type:	Active	Expected Loss Date:	06-30-2039
Gender:	Male	Current Assignment Officer Code:	PO2K
Race:	White	Spouse in Service:	No
Ethnicity:	Not Hispanic or Latino	Weigh-In:	Completed

Rank History			
Rank	Rank Entry Date	Rank End Date	Time in Rank (yrs.)
LT	5/20/2013		2.93
LTJG	11/20/2010	5/20/2013	2.5
ENS	5/20/2009	11/20/2010	1.5
CADET	6/27/2005	5/20/2009	3.89

Position History		
Position Entry Date	Position Description	Department
7/22/2013	OFF CAREER MGMT	PSC OPM-4
7/16/2011	EXECUTIVE OFFICER	CGC SMALL CUTTER
6/19/2009	DECK OFFICER	CGC LARGE CUTTER
6/27/2005	UNKNOWN	CG ACADEMY - CADETS

Education				
Degree	Major	School	Date Acquired	GPA
Bachelor of Science	Government	U.S. Coast Guard Academy	5/20/2009	2.98

Notes & What to Look For



Personal Information

Is all of your personal information accurate?

Common Errors:

- Name (especially if recently married)
- Email
- Race / Ethnicity
- Employee
- Rotation Date

Note: Most personal information will get "Masked" and is not visible during Boards and Panels

Rank History

This section should auto-populate from DA based on your Date of Rank

Note: This entire section gets masked and is not visible during Boards and Panels

Position History

Note: This is a history of the position numbers you were assigned to in your career. It is common to have a mismatch from what is listed here and your actual description of duties due to PAL changes and organizational realignments. Promo boards are told that the ESS is just a referral sheet, and has inaccuracies, and that they should back up all info through the EI-PDR. Board members will read the description of duties block on each OER to validate what you actually did.

Education

Are all of your COMPLETED degrees listed?

If there are errors, work with the CG Institute

Note: The "Date Acquired" and "GPA" get "Masked" and are not visible during Promotion Boards, but are seen during Advanced Education and Screening Panels

Employee Summary Sheet



Training				
Course No.	Course	Start Date	End Date	Status
500271	PROSPECTIVE CO AFLOAT	4/21/2016	4/23/2016	Enrolled
341090	Basic Boarding Officer	3/1/2016	4/5/2016	Completed
810040	Workplace Violence	8/19/2015	8/19/2015	Completed
501377	ICS 300	9/17/2013	9/20/2013	Cancelled
500279	HVAC DESIGN	4/25/2012	4/29/2016	Completed
340720	Leadership & Mgmt School	5/14/2011	5/18/2011	Completed
Tests				
Effective Date	Code	Description	Score	
2/1/2016	LSAT	Law School Admissions Test	155	
1/12/2016	SPL0001	Spanish Listening Comprehension	20	
5/1/2012	GRE-QUAN	GRE Quantitative	164	
5/1/2012	GRE-ANALYTIC	GRE Analytical	4	
5/1/2012	GRE-VERB	GRE Verbal	161	
1/26/2008	000862	EPME MASTER E-8	96	
6/22/2007	000701	DWO INTERNATIONAL/INLAND	92	
Competencies				
Effective Date	Code	Description	Proficiency	Yr Acquired
7/22/2014	HRMPMGR	HR Manpower Manager	Good	2014
1/28/2013	LMRPAC	Boarding Off (Intl Pac LMR)	Good	2013
1/28/2013	LMRWCP	Boarding Off (WCP LMR)	Good	2013
1/25/2012	CGSEOPS	SEOPS Spcial & Emer Ops Proced	Good	2012
1/25/2012	OPSBO	Boarding Officer	Good	2011
1/18/2012	MAREP	SIG P229R-DAK .40 Pistol Qual	UNIT SEC	2012
8/23/2011	OODLG	110 WPB U/W OOD	Good	2011

Notes & What to Look For



Training
This should list your Coast Guard-funded training and comes from courses taken through TQC. If you have attended any professional/technical non-CG training that is not listed here (DOD, private sector, etc), you can list those completed courses on a 4082 form and put that in your EI-PDR.
Tests
These can be CG tests you took through your ESO (DWO, EPME, ASVAB, etc) or tests for advanced education programs (GRE, GMAT, LSATS, etc). Note: The "Score" portion gets masked and is not visible during Promotion Boards but is seen during Advanced Education and Screening Panels
Competencies
Are all of your competencies and quals listed here? If not, check the Competency Dictionary (available on the CG Portal) to make sure a competency code exists for it. If you have earned a competency, but there is no competency code associated with that qualification, you can include it on a 4082 form to submit to your EI-PDR.

Employee Summary Sheet



Specialties				
Effective Date	Code	Description	Proficiency	Yr Acquired
2/26/2015	CG-HRM10	Human Resources (OSC)	Good	2015
2/26/2015	CG-OAF13	Cutter Based LE/HLS (OSC)	Good	2015
2/10/2012	CG-OAF10	Operations Afloat (OSC)	Good - Apprentice	2014
Boards & Memberships				
Effective Date	Description			
8/4/2016	LCDR Promo Board Member			
1/27/2016	Reserve Extension Board Member			
10/1/2015	National Naval Officers Assoc.			
9/30/2015	CG Academy Alumni Assoc			
9/29/2015	NCR Coast Guard Officers Assoc			
10/1/2014	State Bar Association			
3/12/2012	Assoc Naval Services Officers			
1/1/2010	U. S. Naval Institute			
3/8/2006	U.S. Supreme Court Bar			
Medals & Awards				
Effective Date	Description			
11/19/2014	CG Meritorious Team Comm Ribbo			
5/20/2014	CG Achievement Medal			
4/29/2014	CG Meritorious Team Comm Ribbo			
9/16/2006	CG COMDT Ltr of Commendation			
5/25/2006	CG Presidential Unit Citation			
4/1/2006	Iraq Campaign Medal			
Certifications & Licenses				
Effective Date	Description			
1/1/2015	Master, Near Coastal NMT100GT			
6/6/2013	FAA Certified Flt Instructor			
10/10/2012	Professional Engineer			

Notes & What to Look For



Specialties

This is in reference to your OSMS specialty codes. If you are eligible, make sure you have applied and that they are listed here. More info is available on OPM-3's website: (<http://www.uscg.mil/psc/opm/Opm3/opm-3OSMS.asp>)

Boards and Memberships

This is in reference to if you sat on a board or panel as a voting member, such as a Promotion Board, Command Screening Panel, Advanced Education Panel, etc. It also includes professional affiliations, such as NNOA, ANSO, US Naval Institute, Legal, etc. **Note: This section gets masked and is not visible during Promotion Boards but is seen during Advanced Education and Screening Panels**

Medals and Awards

Are all of your medals and awards listed? The listing only includes awards you wear as a medal, ribbon, or insignia with your uniform.

Certifications and Licenses

This section is most commonly used for professional certifications and licenses, such as Merchant Mariner credentials, FAA certifications, and engineering licenses

Electronically Imaged – Personnel Data Record (EI-PDR)

Your Electronically Imaged – Personnel Data Record contains the official documents from your career, and is electronically maintained by the Military Records Branch (PSC-bops-mr).

How do I know if something can go in my EI-PDR?

To see what documents can be placed in your EI-PDR, please refer to *COMDTINST M1080.10I, Military Personnel Data Records (PDR) System*.

How do I review or access my EI-PDR?

There are two ways to review your EI-PDR. You can request an appointment with OPM-4, who can review your EI-PDR with you electronically. You may also request a copy of your EI-PDR through the Military Records Branch, who will send it to you electronically. To request a copy of your EI-PDR, please see this link:

<http://www.uscg.mil/psd/mr/>

Electronically Imaged – Personnel Data Record (EI-PDR) Continued

How do I update my EI-PDR?

If something is missing from your EI-PDR, bring the document to your YNs in your nearest Personnel & Administration (P&A) shop or Servicing Personnel Office (SPO). They will validate that they are authorized entries, and then send to the Military Records Branch (ARL-PF-CGPSC-BOPS-MR-SPO_Support@uscg.mil). Per the Military Records Branch policy, all entries to your EI-PDR must go through your YNs for validation.

Note: If you need something expeditiously added to your EI-PDR, ensure your YNs put “Urgent Board Entry” in the subject line of their email to the Military Records Branch

How do I remove a document that should not be in my EI-PDR?

You will need to engage the Military Records Branch for removing items from your EI-PDR.

How do I know what a Board or Panel will view in my EI-PDR?

Some personal documents (such as Birth Certificate, SGLI Forms, etc) are maintained in your EI-PDR, but get filtered out and will not be seen during Promotion Boards. To see what documents a Promotion Board will view, please refer to *COMDTINST 1410.2 – Documents Viewed By Coast Guard Officer Promotion And Special Boards*

What to Look For in Your EI-PDR

IS EVERYTHING IN YOUR EI-PDR YOURS? Errors happen, make sure the document is yours!

All OERs: Are they signed, legible, and validated? Do the “Period of Report” dates run concurrently from one OER to the next?

Award citations: At a minimum, include the citations for your personal awards since these carry the most weight (Letters Of Commendation & up). You may include Team & Unit award citations as well, but recommendation is to focus on high-impact ones.

3307s (if applicable): Are they signed?

4082 (if applicable): See next page for more information.

Legible Education transcripts for degrees (if applicable): Are completed transcripts there?

Official Test Scores (if applicable): Are GRE, GMAT, LSAT scores in EI-PDR if applying for Post-Grad programs?

Your EI-PDR will likely contain several administrative documents (Oath of Office, Active Duty Agreement, etc). The above items are meant to focus on the documents in your EI-PDR most relevant to boards.




4082 – Record of Professional Development

- Optional, but is a GREAT tool to list pro-dev items not already in your record

- Focus on big-ticket items not already in your record

- No limit to # times you submit one

Reference: Chapter 4.c of COMDTINST M1500.10c - Performance, Training, and Education Manual

U.S. DEPARTMENT OF HOMELAND SECURITY U.S. COAST GUARD CG-4082 (Rev. 2-10)		RECORD OF PROFESSIONAL DEVELOPMENT	
Name (Last, First, MI):		EMPLID:	Rank:
See Instructions on page 2 for completion of this form.			
Key Word(s) (see instructions)	Descriptive Title and Institution and/or Location of Activity	Qualification, Cert., Grade or N/A	Date Completed
Member Signature*: 		Date Submitted:	
Commanding Officer Signature*: (required) 		Date Approved:	
* By signing above both Member and Commanding Officer certify that all information submitted in this form is accurate and correct based on actual achievements by the member.			
PREVIOUS EDITIONS ARE OBSOLETE			
			

Conclusion

Review your record early and often

Know your Resources:

- Work with your Admin for updating your ESS and for sending documents to the Military Records Branch
- Work with the Coast Guard Institute for updating Education in your record
- Work with Military Records Branch for receiving a copy of your EI-PDR, for questions regarding what is allowed in your EI-PDR, and for removing documents from your EI-PDR
- Work with OPM-4 for reviewing your record

OWN YOUR RECORD – MAINTAINING IT IS YOUR RESPONSIBILITY!